

The Professional Handover

Aim of the Video

Successfully referring a customer from one employee to another requires focus to minimise mistakes and maximise the opportunity to exceed customer expectations. Staff will learn a 4-step process that enables them to refer customers between each other in a way that leaves customers feeling respected and valued.

The 4-step process also helps to develop a sense of trust between staff members which is the essence of a culture of service excellence.

Play the video up to the Pause

The Activity

If staff need help coming up with the possible steps you can...

- Provide attendees with a real example of a customer who would need to interact with more than 1 employee of the business.
- Ask attendees to consider the last time they interacted with a business who provided a seamless handover. What were the actions that made it a positive experience?
- Remind attendees to consider the non-verbal handover steps also ie: body language and written communication.
- Remind staff of the importance of adhering to privacy and confidentiality standards when sharing customer details with other staff ie: who else can hear your conversations, what can and cannot be shared with external or 3rd parties?

Before returning to the video

- Share and compare the identified steps.
- Ask the attendees **“How could we improve handovers for our customers?”**

Press PLAY

Post Video ACTION

- If you need more than 4 steps, or more than 1 handover process, make sure the steps are easy for staff and customers to follow.
- Record the steps and review them regularly.

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HANDOUT

What are the key steps you believe must be taken to ensure that our customers can move between staff members with little or no stress?